

Performance Measurement

What did the legislature buy for \$7.9 billion dollars and is the state better off?

Performance Measurement

- A top priority of the LFC for the last two biennia
- Implements strategies developed in the 2007 interim
- Provides for increase opportunities

Purpose of Training

- Provide background in the performance measurement philosophy utilized in this project
- Provide update on the progress of implementation of the performance measurement project
- Provide overview of workgroup process
- Provide a process to aid in determining the impacts of \$7.9 Billion in appropriation authority.

Premise of Training

- Starting with the basics
 - Feel free to tell me to “Move On”
- Provide the tools to aid in answering the question:
 - ARE WE (THE STATE) BETTER OFF ??
 - Identify areas where legislative assistance may be needed

“If I include you,
you will be my partner.

If I exclude you,
you will be my judge.”

- Rosell

Philosophy

- First purpose of performance measurement is to improve performance
- The purpose of performance measurement does not include punishment.

It's an interactive, dynamic process

- Performance measurement provides legislators with information on how things are going now.
- It allows for early identification of issues and concerns and allows for legislative input early in the process.
- In many cases it answers the question – are we better off from the investment?

Statutory Authority

- 17-7-111(3)(c) *"The agency budget request must set forth a balanced financial plan. The plan must include a statement of the goals and objectives for each program that includes sufficient specific information to enable the legislature to formulate appropriations policy regarding the programs and allow a determination, at a future date, on whether the agency has succeeded in attaining its goals and objectives*

Emphasis added

Ask ---

- Does the information provided from the measurement of goals and objectives provide ample information for my colleagues and I to formulate appropriations policy?

Build on what you have..

- Critical Goals (Template)
 - A few key goals to measure agency progress
- Initiatives (Expanded Justification)
 - New Proposals or significant present law adjustments that expand state government
 - Legislative interest
- NOTE: This material was drafted by the executive branch and presented to the legislature during the 2007 session. For the purpose of this project – LFD staff did not re-write any of the information – but agencies were provided the opportunity to update.

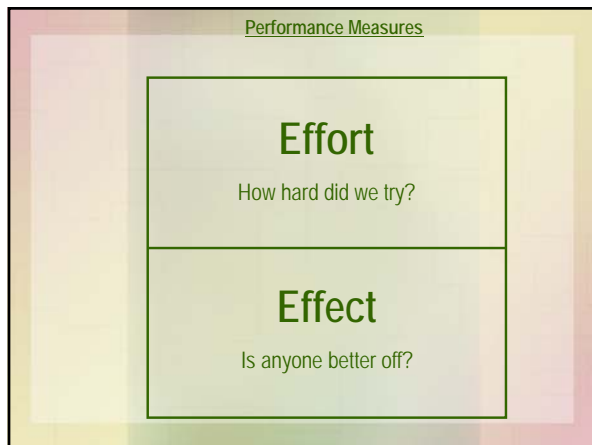
Language Lingo

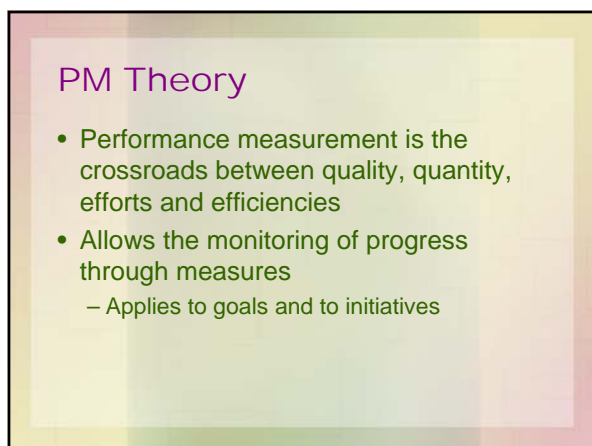
- Goal
 - The end to which all efforts are expended. A broad statement of the long-term results needed to accomplish the program's mission.
- Performance Measures (Objectives)
 - Meaningful indicators used to determine performance; a criterion or value used to determine the magnitude or degree of success towards the goal. **S.M.A.R.T**
- Milestones
 - specific target dates for specific activities to be accomplished
- Costs
 - appropriated vs. expended

**“All performance measures
that have ever existed
for any program
in the history of the universe
involve answering two sets of
interlocking questions.”**

Mark Friedman, Results and Performance Accountability







PM Quadrant

	QUANTITY	QUALITY
E F F O R T	What did the agency do? (# of cases, # of permits, # of services)	How well did the agency do it? (% of timeliness, % of satisfaction, % of completeness, client to staff ratio)
E F F E C T	Are we, the sub- population , better off ? (# of successful cases, increase in permits, # increase in services)	Are we, the state , better off? (% of compliance in permits, services, decrease in rates, increase in rates)

PM Quadrant

	QUANTITY	QUALITY
E F F O R T	MOST CONTROL A count of activities Agency Driven	A statistical account of service delivery
E F F E C T	Sub-population improvement Requires Partnership	LEAST CONTROL Improvement for the state as a whole

PM Quadrant

	QUANTITY	QUALITY
E F F O R T	MOST CONTROL A count of activities X Make the Move Agency driven	A statistical account of service delivery
E F F E C T	Sub-population improvement Requires partnerships	LEAST CONTROL Improvement for the state as a whole X

Process Point

- Critical Analysis
 - Staff review of templates and initiatives to select critical goals and significant initiatives for tracking
- Negotiation
 - Met with agency representatives and OBPP to agree on the selections, or make modifications
 - Provide the opportunity to clean up goals or information presented in initiatives

Progress Point

- Agencies, and divisions within agencies are at different points in the process.
 - Performance measures may have been negotiated at this point, some are waiting outcome of today.

Philosophy meets Progress

- Place the performance measures into the QUAD
- ASK:
 - Does the information provided from the measurement of goals and objectives provide ample information for my colleagues and I to formulate appropriations policy?

Area: Transferability & Student Data

DP 1061 - Improve Transferability and Student Data QTCO... The legislature approved increasing general fund by \$1.5 million (\$970,099 is one-time only) for the 2009 biennium to fund a comprehensive, system-wide program to improve the transferability of student coursework between the campuses of the university system. This proposal includes an additional 2.50 FTE, as well as approximately \$70,000 over the biennium to specifically support enhancements to dual enrollment programs as part of the student transferability initiative.

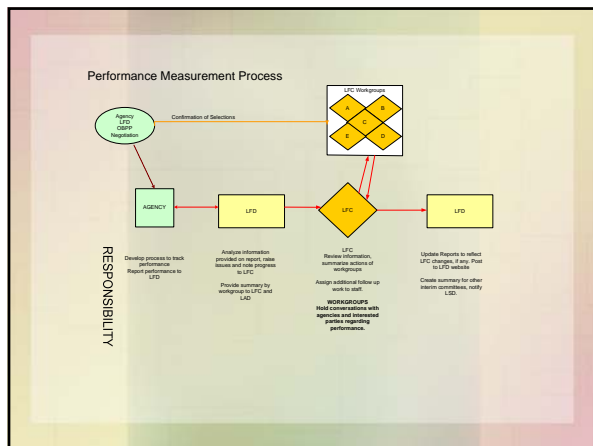
	QUANTITY	QUALITY
E F F O R T	<ul style="list-style-type: none"> • Create 11 faculty councils • Create transfer pathways in 11 different program/subject areas <p>(By August 2008)</p>	<ul style="list-style-type: none"> • That the number of pre and postsecondary education credits accepted for transfer by the MUS has increased by 15% over 2007 baseline (including but not limited to dual enrollment, running start, advanced placement, and tech prep) • That the number of student appeals of credit transfer decisions is reduced below the prior year rate toward a total reduction of 50% by 2009-2010
E F F E C T	<ul style="list-style-type: none"> • The number of pre and postsecondary education credits accepted for transfer has reached _____ (compared to _____ in 2007) • The number of student appeals of credit transfer decisions is down to _____ (compared to _____ in 2007) <p>(By end of 2009 Biennium)</p>	<ul style="list-style-type: none"> • That retention rates and completion rates for students that have transferred between campuses and transferred in coursework from other institutions are at the same level as retention and completion rates for students that have not transferred <p><small>[Derived from Shared Policy Goal I and BOR Strategic Plan Goal I(12)]</small></p>

Goal: Build and maintain a good working relationship among Montana's landowners, hunters and FWP staff.		
	QUANTITY	QUALITY
E F F O R T	# of acres enrolled in block management for big game season	% of landowners and hunters satisfied with the block management program as compared to previous year
	# of landowners enrolled	
	# of hunter days on block management land	
E F F E C T	Increase in the number of landowners, acres, hunter days as compared to previous year	The degree in which, hunters, landowners are satisfied with their ability to participate in the block management as demonstrated by the increased in land available for hunting opportunity and the increase in satisfaction by all parties.

Goal: Increase the percentage of children receiving well-child screens for Medicaid.		
	QUANTITY	QUALITY
E F F O R T	Number of Medicaid enrolled children (< 20 years of age)	Percent of number of enrolled children receiving a well-child screen compared to base line.
E F F E C T	This is not addressed	This is not addressed

Are we better off?

- No –
 - Does the goal represent what the legislature needs to know?
 - Do the performance measures need to be changed to reflect what data is currently available?
 - How can the legislature help improve outcomes through budget or policy changes?
- Yes -
 - How can the legislature further continual improvement ?
 - Or what are the next steps to consider?



Process Point

- Overview of what has been accomplished
- Activities for this meeting:
 - Workgroup Decisions
 - Provided selections in mail out
 - Updates at workgroups
 - LFC Confirmation
 - Wednesday summary of workgroups and full committee agreement on the selected goals and initiatives

Workgroup Decisions

- **TODAY**
 - Review proposed goals and initiatives for measurement through the interim.
 - Discuss proposal with agency
 - Modify proposed list if necessary
 - Summarize outcome of workgroup to full committee tomorrow
- **PROCESS**
 - LFD Staff will introduce the goals and initiatives that have been negotiated.
 - Any issues will be raised
 - Agency comments
 - Legislator – Questions, Comments, or Concerns
 - Direction to Staff
 - Accept
 - Renegotiate
 - Raise to full LFC

A word about Initiatives

- Agencies may need to hire staff, set up programs and partnerships, and begin providing services before measuring if their customers are better off.
- They should be able to communicate what the anticipated measurement will be in the future.
- They should be able to communicate where they are in the process.

Tools

- Question
 - Encourage
 - Modify Selection
- Needs to meet the legislature's need for information to make appropriation policy.

Communication of Results

- Selected Goals and Initiatives
 - Finalized by the LFC members
 - Posted to LFD Web site
 - Other interim committees notified of availability of the reports
 - Notified of the availability of LFD staff to explain the process

Next Meetings

- **December**
 - Hear the first performance report
 - Discuss performance successes and concerns with agency
 - Finalize the performance report
 - Ask for follow up of staff or agency
 - Summarize outcome of workgroup for full committee
 - Post to LFD website, notify interim committees
- **June 2008**
 - Hear the next performance report

Ask ---

- Does the information provided from the measurement of goals and objectives provide ample information for my colleagues and I to formulate appropriations policy?

Workgroup Locations

- Section A – 350
- Section B – 172
- Section C – 335
- Section D - 137
- Section E - 152
